



State of California

Employment Training Panel

Arnold Schwarzenegger, Governor

October 21, 2008

Bill Barber, President and CEO
ISOmatrix Inc.
100 Moody Court, Suite 105
Thousand Oaks, CA 91360

Dear Mr. Barber:

RE:	Agreement Name:	ISOmatrix Inc.
	Agreement Number:	ET07-0376
	Term of Agreement:	05/01/07 – 10/30/08
	Agreement Amount:	\$5,280
	Type of Trainee:	Retrainee
	Trainees to be Retained:	4

This report summarizes the results of the **Final Monitoring Visit** conducted via telephone conference between you and Lan Vuong, ETP Analyst, on October 14, 2008.

FINAL REPORT SUMMARY:

• HISTORY OF AGREEMENT

This Agreement was executed on April 18, 2008 and training began on October 5, 2007. Mr. Barber reported that all training was completed on July 25, 2008, which allowed for the 90-day retention period to be completed within the term ending date of the Agreement – October 30, 2008.

ETP approved one Agreement Amendment on 02/14/08, to change the term date from 05/01/07-04/30/08 to 05/01/07-10/30/08.

• FINAL PROJECT STATISTICS

Your Agreement contains a variable training plan, which means that reimbursement will be based on the total actual number of training hours completed by each trainee between 8 and 60 training hours. There will be no reimbursement for any trainee who does not complete a minimum of 8 hours of training from the approved curriculum.

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ETP (04/15/05)

Although Chart 1, Exhibit A of the Agreement, specified that there would be 4 trainees to be retained, Mr. Barber reported that only 3 trainees completed training and the 90-day retention period. This resulted in a completion rate of 75 percent with approximate earnings of \$3,960 which is 75 percent of the Agreement amount.

The following chart shows a breakdown of training hours and projected reimbursement as shown on the ETP Online Tracking System:

TYPE OF TRAINING	HOURS COMPLETED	PROJECTED REIMBURSEMENT
Class/Lab	180	\$3,960
Total	180	\$3,960

To date, your company has received \$660 in progress payments; therefore you will receive an additional \$3,300, if the anticipated number to retain is verified during the final fiscal closeout.

Mr. Barber informed the Analyst that he will submit the final contract closeout invoice and associated documents to ETP on or before the close of business on **November 30, 2008.**

- INTERVIEW WITH CONTRACTOR'S REPRESENTATIVE**

Mr. Barber reported that the company was not able to provide all the training originally intended in this Agreement due to one employee left the company before completed a minimum of 8 training hours.

Mr. Barber reported that although ISOMatrix did not earn 100 percent of the available funds, the training provided increased employee skills in Continuous Improvement and Computer Skills, which helps ensure that the company meets the quality standards required by the industry. ETP funds made it easy for the company to move forward with training.

He also stated that he did not experience any problem with ETP record keeping and that ETP staff was very helpful in providing assistance in the administration of this project.

PROJECT STATUS PROVIDED BY THE CONTRACTOR:

Trainees Started Training:	4	Completed Training:	3
Trainees Enrolled:	4	In Retention Period::	1
Dropped Following Enrollment:	1	Completed Retention	2
Completed Minimum Hours for reimbursement:	3		

The project statistics provided by you matches those listed on the ETP Contract Status Report.

TRAINING RECORDS

The Contractor faxed rosters covering the period January 16, 2008 through July 25, 2008 for Continuous Improvement to the Analyst. The records reviewed demonstrated that the Agreement curriculum was provided and the required trainer-to-trainee was adhered to.

Mr. Barber was advised that the above findings are based only on the training records reviewed during this telephone visit and represent only a sample of the training records completed to date. Therefore, it is your responsibility to ensure that all training records comply with Panel requirements for auditing purposes. (Reference: Title 22 California Code of Regulations, Section 4442)

AUDIT

Your company will be notified in writing if this agreement is selected for an audit that will be conducted either at your site (field audit) or by telephone if selected for a desk review. These notifications will be sent in advance to allow ample preparation time and will include a list of documentation that will be examined by the auditor. A list of the documentation typically examined during an audit will be included along with the Audit Notification and Audit Confirmation letters.

To provide support of training, original training attendance documentation is required; photocopied records are not acceptable. Listed below are types of records typically requested during an ETP field audit:

- Training attendance records such as rosters, sign-in sheets, etc.
- Payroll records of individual trainees to verify wage and hours worked
- Personnel records regarding occupation and dates of employment
- Documentation of employer paid health benefits (if applicable)
- Cash receipts to verify receipt and accounting of ETP funds

RECORD RETENTION

Records must be retained within your control and be available for review at your place of business within the State of California. This responsibility will terminate no sooner than four (4) years from the date of the termination of the Agreement or three (3) years from the date of the last payment by ETP to the Contractor, or the date of resolution of appeals, audits, claims, exceptions, or litigation, whichever is later.

Please contact Lan Vuong within ten (10) working days at (818) 755-1306 or by email at lvuong@etp.ca.gov if you have any questions or comments.

Sincerely,

Signature on file

Dolores Kendrick, Manager
North Hollywood Regional Office

Signature on file

Lan Vuong, Project Analyst
North Hollywood Regional Office

cc: Amber Luiz, Assistant Director (via email)
David Guzman, Chief Program Operations Division (via email)
Kulbir Mayall, Manager, Fiscal and Certification (via email)

Master File
Project file

Date report mailed to Contractor 11/4/08